CCTO Tool Reference for Minor Contacts

COVID-19 Community Team Outreach

Conducting outreach to minors requires special steps within the CCTO Tool:

This is a reference for the CCTO Tool. Contact your supervisor and review any relevant scripts, policies, and procedures for questions on outreach to minors. ***Legal guardians should respond to assessments on behalf of minors under 13. For older children, determine the best option with their legal guardian.***

Documenting Minor Status

1. If a contact or case patient is under the age of 18, it is important to document their status as a minor. **First, ensure the contact's date of birth has been entered correctly.** Then, scroll to the bottom of their profile to "Demographic Info."
2. **Click the "Is Minor" button to turn it to "Yes."** Selecting this field provides a reference point for you and helps us to tag and understand contact data most effectively.
3. ***If it is useful for your reference, you may also input "Current Age"*** *when you enter "Gender," "Race," and "Ethnicity."*
4. ***If your contact is a member of a household containing other contacts, you may toggle "Household Relationship" to "Child."*** *If your contact does not belong to a household, you may leave this field blank. Review the "Handling Household Contacts" job aid for instructions on adding and incorporating contacts in households.*

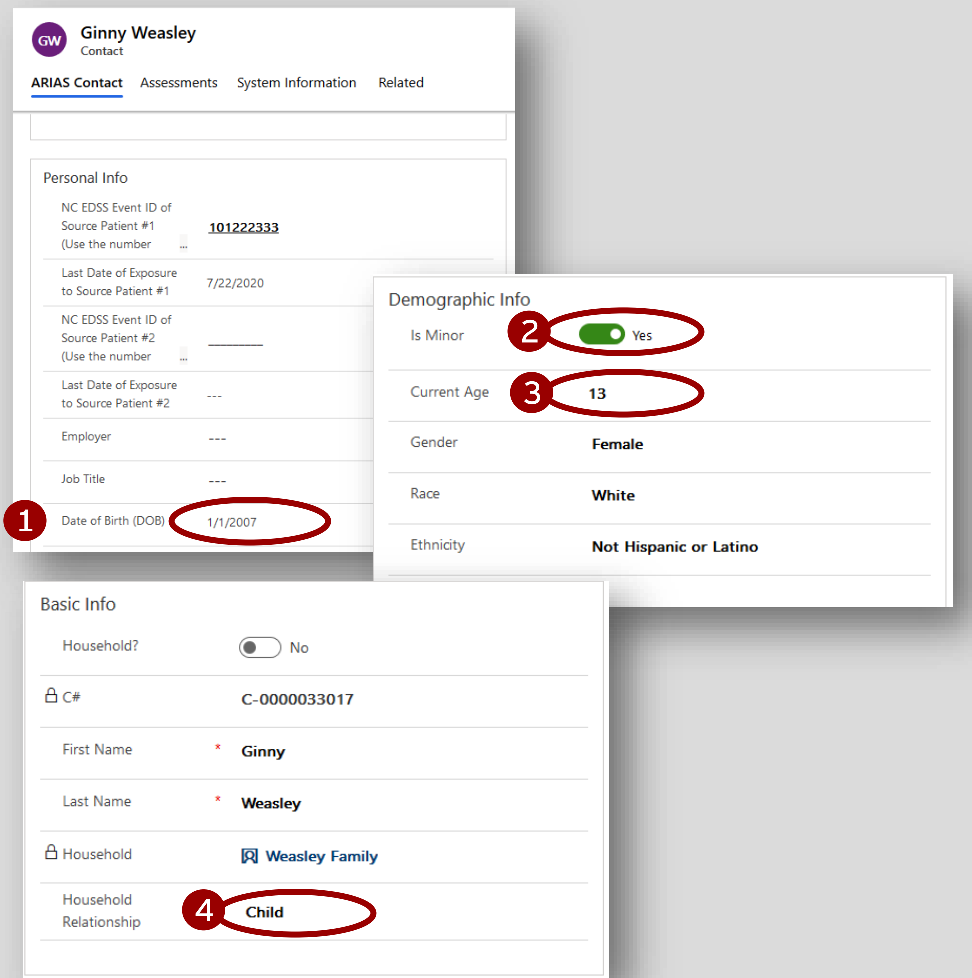
1 **"Date of Birth"**

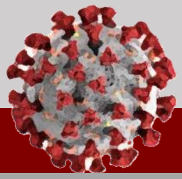
2 **"Is Minor"**

3 ***"Current Age"***

4 ***"Household Relationship"***

NOTE: If a minor and their legal guardian are both contacts living in the same household, **review the Household Contacts job aid for best practices on documenting this relationship.**





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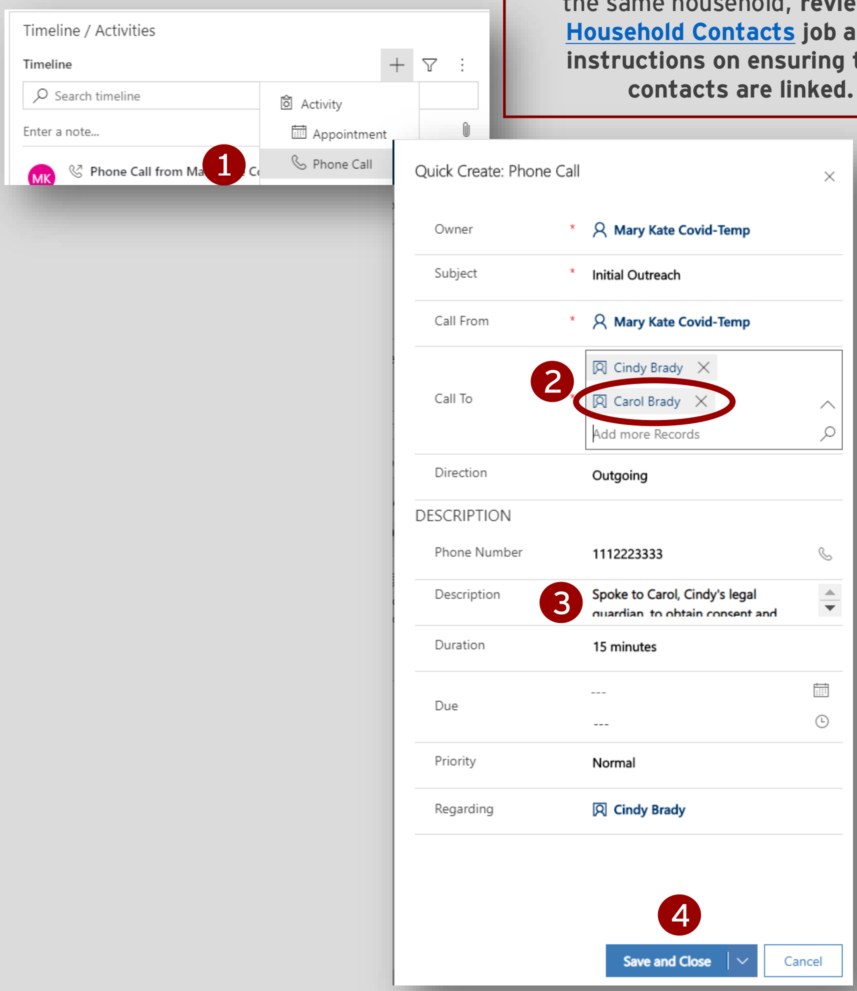
Initial Outreach to Minors

1. In the Timeline/Activities tab, click "+" → "Phone Call" to log your outreach. **Per your training, request to speak with the contact's legal guardian.**
2. While speaking with the contact's legal guardian, note their name. **If** they are an existing contact in the system, you may choose to tag them to the "Call To" section by typing and selecting their name or email address; **otherwise:**
3. Include any relevant details about the phone conversation (including to whom you spoke) in the description.
4. Press "Save and Close."

1	**"Phone Call"**
2	**"Call To"**
3	**Description**
4	**"Save and Close"**

NOTE: If a minor and their legal guardian are both contacts living in the same household, **review the Household Contacts job aid for instructions on ensuring these contacts are linked.**

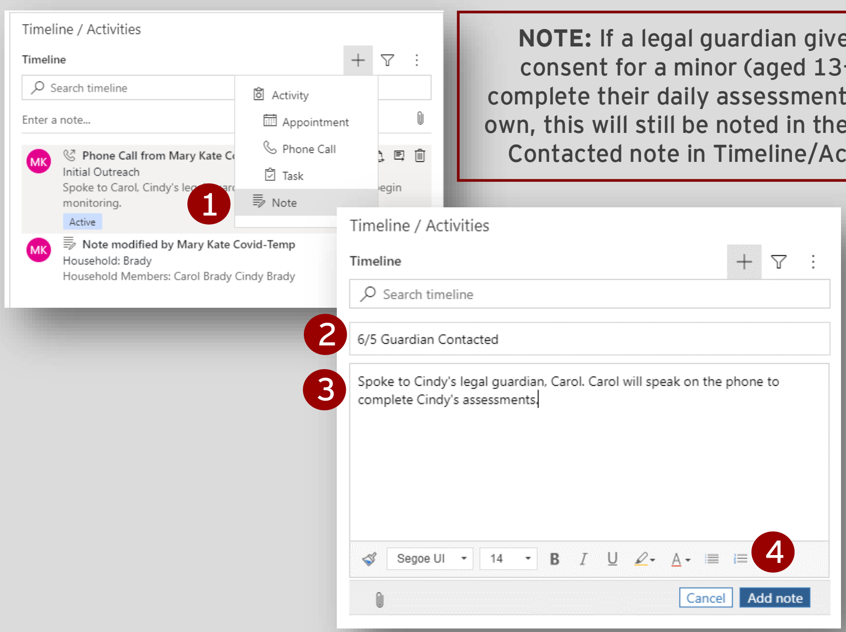


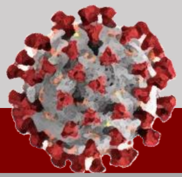
Documenting Consent

1. In the Timeline/Activities tab, click "+" → "Note" to create a dated reference note.
2. Title this note with today's date and "Guardian Contacted."
3. In the description, **record with whom you spoke and how the minor's assessments will be completed** (e.g., "Spoke to Jane Doe, John's legal guardian. John will complete digital assessments on his own.").
4. Click "Add Note." **Note: if you edit this note again, the timestamp will change.**

1	**"Note"**
2	**Title**
3	**Description**
4	**"Add Note"**

NOTE: If a legal guardian gives their consent for a minor (aged 13-18) to complete their daily assessments on their own, this will still be noted in the Guardian Contacted note in Timeline/Activities.





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Conducting outreach to minors requires special steps within the CCTO Tool:

Phone Assessments Completed on Minors' Behalf

1. While speaking with a legal guardian, begin a manual assessment by clicking the contact's "Assessments" header and pressing "+New Assessment."
2. Record answers per your training by selecting from the dropdown menus. **Don't forget to populate the "Agreement" field.**
3. In the "Other" box at the bottom of the screen, **note the name of the guardian completing the assessment on behalf of this minor.**
4. Press "Save and Close."

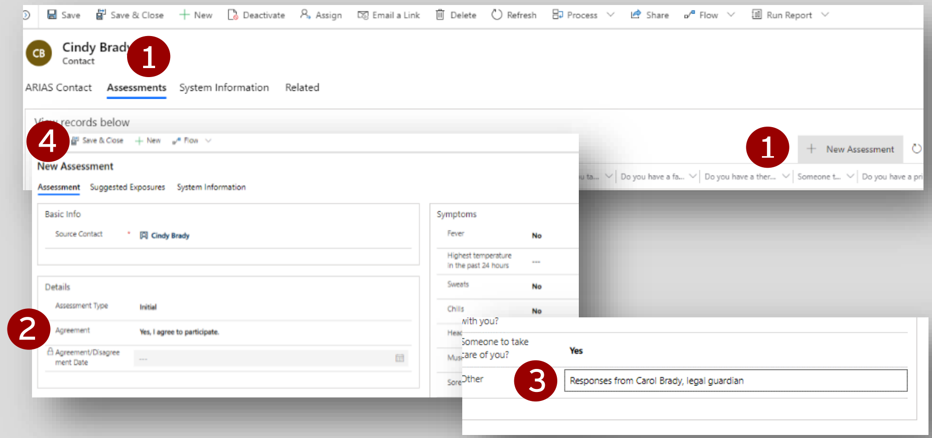
1 **"+New Assessment"**

2 **"Agreement" field**

3 **"Other" box**

4 **"Save and Close"**

Read on for instructions on how you can create views to help you track all minors or only those contacts under the age of 13.



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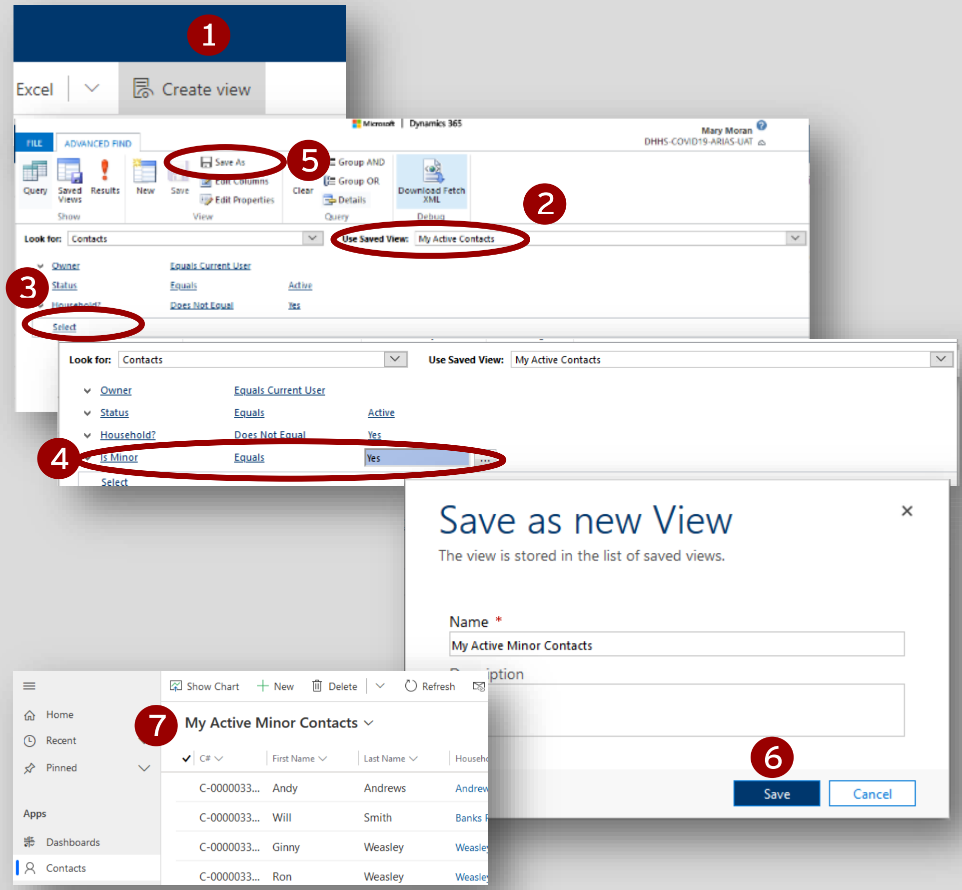
If you wish to create separate views to help you track minors, review the following examples:

Creating a View with a Filter for the "Is Minor" Field

1. Click "Create View" in the top menu.
2. In "Used Saved View," select "My Active Contacts."
3. Click the word "Select" (below "Status") to add a criteria, and choose "Is Minor" from the dropdown.
4. Leave the "Equals" dropdown as it is, and select "Yes" from the third column to **return only records labeled as minors.**
5. Click "Save As."
6. Name your view and click "Save."
7. The view is now available in the Contacts tab by clicking "My Active Contacts" and choosing your new view.

1	"Create View"
2	"Used Saved View"
3	"Is Minor"
4	"Equals," "Yes"
5	"Save As"
6	"Save"
7	Contacts Tab



Creating a View for Contacts Under the Age of 13

This view can used to see only contacts whose assessments are recommended to be completed by guardians:

1. *See steps 1 and 2 above.*
2. Click the word "Select" (below "Status") to add a criteria, and choose "Date of Birth" in the leftmost dropdown.
3. Change "Equals" to "Last X Years," and type "13" in the box that appears. **This will show contacts 0-13 years old.**
4. *See steps 5-7 above.*

1	***See #1-2 above***
2	"Date of Birth"
3	"Last X Years," 13
4	***See #5-7 above***